



SUMMER 2025

NEWSLETTER



The Estate Planning Council of Long Island Welcomes our
New Board of Directors for 2025-2026!



President
Alison Gladowsky
Esq., AEP®



Vice President
Joseph T. La Ferlita
Esq.



Treasurer
Jeffrey Gibraltar
CPA/ABV/CFF®, CFE, AEP®



Secretary
Alyssa Danziger
Esq.

**Immediate
Past President**



Peter S. Manzi
CFP®, CEPA®



Executive Board Member
Brian D. Conboy
TO



Executive Board Member
Charles R. DeRiso
CPA



Executive Board Member
Mark Mohtashemi
J.D., LL.M., MBA, CFP®



Executive Board Member
Nicholas G. Moneta
Esq.



Executive Board Member
Elisa Pickel
Esq.



Executive Board Member
Joanne Campbell Schiefer
AFP



Executive Board Member
Stephen J. Silverberg
Esq., CELA®, AEP®



Executive Board Member
Nicole M. Smith
Esq.



NAEPC Liaison
Richard G. Chalifoux
J.D., AEP®



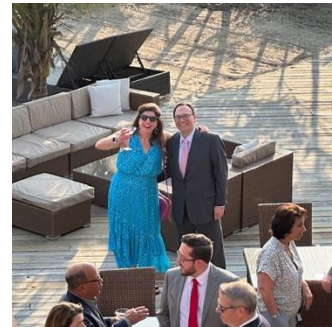
Council Administrator
Lisa Maloney

Our council needs you! There are many opportunities to be more active with our council that would benefit from your time and talents on behalf of the council. Please consider joining a committee and help us continue a legacy of success!

**VIEW OUR
COMMITTEES**



PHOTOS FROM OUR ANNUAL DINNER





PHOTOS FROM
OUR ANNUAL DINNER





NEWSLETTER

For her many years of outstanding leadership and service to the Council, we are pleased to present

The 2024/2025 Gary H. Friedenbergl Service Award to:



Ilene Samuel



SUMMER 2025



A SPECIAL THANK YOU
TO OUR COUNCIL'S SPONSORS

Our sponsors provide tremendous financial support to the council, allowing us to maintain the cost of dues without an increase for nearly 10 years. They support the estate planning profession with advice, products, and services that benefit our clients. Please keep them in mind when you have a need.

WE WOULD LIKE TO THANK OUR PLATINUM SPONSORS!



CAPTRUST



WebsterBank



ENCORE
LUXURY LIVING

WE WOULD LIKE TO THANK OUR GOLD SPONSORS!



BNY | WEALTH



Fiduciary Trust
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Business Valuators &
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Advisors & Accountants

MEYER SUOZZI

WE HOPE YOU WILL CONTINUE YOUR SUPPORT
IN THE NEW COUNCIL YEAR!

Interested in becoming a Sponsor for 2025-2026? Visit our Sponsor Form for more information or email zaloney@hotmail.com.

SPONSOR FORM



ESTATE
PLANNING
COUNCIL

OF LONG
ISLAND



NEWSLETTER

A LETTER FROM PETER MANZI OUTGOING PRESIDENT



Dear Council Members:

As the council year comes to a close, I wanted to relay my sincerest gratitude to our Officers, Executive Board Members, Committee Chairs, Committee Members, our NAEPC Liaison, our Council Administrator, and Sponsors for contributing to a very successful year. Council leadership positions are on a volunteer basis and we are very grateful to all of you that shared your valuable time and talent for the benefit of our members.

I also want to thank our members who fully utilize the resources of our council by attending our educational meetings, enjoying social networking events, and accessing NAEPC information especially the Journal of Estate & Tax Planning and monthly webinars which are free to council members. At the back of this newsletter you will see reminders on how you can take full advantage of your membership.

Our application for The Council of Excellence Award has been submitted and we are awaiting NAEPC's decision. We are confident that our council will extend its long legacy of recognition.

As we prepare for the 2025-2026 council year and transition to a new leadership team under our incoming president, Alison Gladowsky, we will continue our focus on quality CE programs, increased membership, developing the next generation of council leaders, active participation of members, and maintaining our reputation for consistently being among the best estate planning councils in the country.

Looking forward, we need the support of our members to continue identifying new members, participate in council committees, and share new ideas to continue our upward trajectory.

It has been a privilege serving as our council's president. The experience has brought me great satisfaction, personal fulfillment, new relationships, and deeper friendships.

Enjoy the Summer and see you in September!

Highlights of 2024-2025 Council Year

23 New Members

5 New AEP Designations

Launch of Council Newsletter

Council Sponsorships at
All-Time High

Law School Student Membership
Program Initiation

Council Logo Swag Store

Inter-Council Cooperation

First Food Drive for Island Harvest

Strong Financials for Future Success

Opportunity! Commitment! Leadership!



NEWSLETTER

A LETTER FROM ALISON GLADOWSKY

INCOMING PRESIDENT



July 1, 2025

Greetings Members and Guests:

Welcome to the 2025–2026 Council year. I hope your summer is off to a great start and that this message finds you and your families, friends and colleagues in good health and high spirits. It is an honor to serve as your President of the Estate Planning Council of Long Island (EPCLI). With the dedication of our outstanding Board, we've planned a meaningful year of timely education, dynamic programming and opportunities to connect in new and impactful ways.

EPCLI continues to thrive as a trusted forum for attorneys, accountants, financial advisors, bankers, trust officers and nonprofit leaders. As a multidisciplinary group, we are united by a shared commitment to advancing estate planning knowledge, building professional relationships and enhancing the services we provide to our clients and communities. We are proud that our high standards have been recognized by the National Association of Estate Planners & Councils, which has honored EPCLI as a Council of Excellence in previous years.

Looking ahead, we also celebrate the progress made over the past year. Our student membership initiative is growing and we remain enthusiastic about supporting the next generation of estate planning professionals. We launched a monthly digital newsletter to keep members informed, highlight accomplishments and share updates between meetings. We also continued our tradition of recognizing excellence in the profession through the Gary H. Freidenberg Service Award. Congratulations to our 2024–2025 recipient, Ilene Samuel, on this well-deserved honor.

This year's calendar features a strong lineup of breakfast and dinner meetings with nationally recognized speakers covering today's most relevant estate planning topics. We are especially excited to kick off the season on Tuesday, September 16, 2025, with a dinner meeting at Volpe featuring guest speaker Sam Donaldson.

Thanks to the continued generosity of our sponsors, we're planning a full slate of engaging social events and launching new membership enhancements. We are also pleased to continue offering CE credits as part of your member benefits. Dues will remain unchanged again this year, allowing us to deliver a high-value experience while keeping costs accessible.

Please visit our website for the latest updates on events, resources and membership details. Whether you are returning or new to EPCLI, I encourage you to take full advantage of all the Council has to offer.

I look forward to a rewarding year of learning, collaboration and connection, and to seeing you at our upcoming events.

Very truly yours,

Alison Gladowsky, Esq.
2025-2026 Council President

SUMMER 2025



SAVE THE DATE

Save the Date!

FOR OUR SEPTEMBER 16th KICKOFF MEETING



Speaker: Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
 Interim Associate Dean for Academic Affairs and Professor of Law
 Georgia State University College of Law

Volpe at Fox Hollow
 7725 Jericho Turnpike, Woodbury, NY 11797

5:30pm Cocktails and Networking
7:00pm Dinner and Program

No Charge for Members in Good Standing, Guest: \$75.00



Save the Date

62nd Annual NAEPC Advanced
ESTATE PLANNING STRATEGIES CONFERENCE
 &
COUNCIL LEADERSHIP CONFERENCE

Join **LEADERS** in the **ESTATE PLANNING** COMMUNITY.

October 19 - 23, 2025
 Washington, DC
 Gaylord National Resort & Convention Center

UPCOMING EVENTS

JUL 9 th	NAEPC Webinar: Addressing the Human Side of Wealth to Meet the Planning Needs of UHNW Families, Jim Coutre
SEP 16 th	Kickoff Meeting with Speaker Sam Donaldson Venue: The Volpe at Fox Hollow, Woodbury, NY <i>Dinner Meeting: 5:30pm - 10:00pm</i>
OCT 19 th	NATIONAL EVENT: 62nd Annual NAEPC Advanced Estate Planning Strategies Conference

To stay up to date on the council's upcoming events, Check out our Events Page.

EVENTS PAGE



MEMBER REMINDERS



Be on the lookout for a membership renewal notice shortly.
Member dues will NOT increase in the new council year!



Council sponsorships for 2025-2026 are now available. Applications are due by July 31st and payments due by August 15th

[2025-26 Sponsor Information](#)



Raise your professional profile within our council. If you have written an article, received an award, changed firms/companies, joined a related organization please let us know so we can feature the news in a future newsletter.



Please review your EPCI directory profile to ensure you have a headshot and current bio.



Make full use of your membership and review the resources offered by NAEPC:

[National Association of Estate Planners & Councils - NAEPC](#)



Access the complimentary NAEPC Journal of Estate & Tax Planning:

[NAEPC Journal of Estate & Tax Planning](#)



Consider applying for the AEP designation:

[AEP Introduction - NAEPC](#)

SEE YOU IN SEPTEMBER!!!



This newsletter was designed for the Estate Planning Council of Long Island by Steve Danziger
Contact s1danziger@gmail.com for inquiries

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